

The screenshot shows the 'Quotes' section of the Air4media Pilot v10 BETA application. The interface features a sidebar on the left with navigation options: Dashboard, Documentation, ENTITIES, LING, Invoices, Quotes (highlighted), Products, MARKETING, DIA, BSITE, SETTINGS, and PLATFORM. The main content area displays a table with columns: Quote #, Title, Account, Status, Total, Items, Valid Until, Created, and Actions. The table is currently empty, showing 'No records found' and pagination controls for 'Page 1 to 0 of 0 records'. A '+ New Quote' button is visible in the top right corner.

Quotes

Create and send professional quotes to clients, track their status, and convert accepted quotes into contracts or invoices.

Key Features

- **Quote List:** View all quotes with status, total value, account, item count, expiry date, and creation time at a glance
- **Status Tracking:** Follow each quote through its lifecycle — Draft, Sent, Viewed, Accepted, Declined, Expired, or Revised
- **Line Items:** Build quotes from custom items, catalog products, or pre-built packages
- **Sections:** Group line items into named sections to organize complex quotes clearly
- **Pricing Controls:** Apply per-item discounts, a quote-level discount (fixed or percentage), and tax rates
- **Taxable Items:** Tax applies only to items marked as taxable — set automatically when adding products from your catalog
- **Optional Items:** Mark line items as optional so clients can see add-on choices without inflating the total
- **Client Signature:** Capture the client's digital signature and signed name when they accept

a quote

- **One-Click Conversion:** Turn an accepted quote directly into a contract or invoice
- **Duplicate:** Copy any existing quote as a new draft to speed up repeat work
- **Filter & Search:** Filter by status or search by quote number, title, or account name
- **Dashboard Stats:** See totals for Draft, Sent, and Accepted quotes plus the combined value of accepted quotes
- **Automation Triggers:** Accepted quotes can trigger automated workflows

How to Use

Create a Quote

1. Click **New Quote** in the top-right corner
2. Fill in the **Title** and select the **Account** (both required)
3. Optionally link a **Project** and **Contact** — selecting an account auto-populates available options
4. Set a **Valid Until** date and choose a **Pricing Tier** (Retail, Pro, Wholesale, or Custom)
5. Add an intro message, payment terms, terms & conditions, and a closing message as needed
6. Add **Internal Notes** visible to your team only — never shown to the client
7. Click **Save Quote**

Add Line Items

In the right panel of the quote editor:

1. Click **Custom Item** to add a freeform line item (Service, Product, Labor, or Expense)
2. Click **Product** to pick from your product catalog — taxable status and pricing are carried over automatically
3. Click **Package** to add a pre-built bundle — savings vs. individual items are shown
4. For each item, set the name, quantity, unit price, and an optional per-item discount
5. Use the **Section** field to group related items under a named heading
6. Check **Optional** to mark items as add-ons — excluded from the total unless selected

Send a Quote

- Open a draft quote and click **Send to Client**, or click the **Send** button directly from the quote list
- The quote status changes to **Sent**

- When the client opens the quote link, it moves to **Viewed**

After Acceptance

Once a client accepts a quote (with optional digital signature):

- Click **Convert to Contract** to create a draft contract pre-filled with all quote details
- Click **Convert to Invoice** to create a draft invoice with all line items carried over
- If you use Workflows, a quote acceptance can trigger automated follow-up actions

Manage the List

- Use the **Status** filter to view quotes by stage
- Click **Duplicate** on any row to copy a quote as a new draft (valid date resets to 30 days)
- Select multiple quotes and click **Delete Selected** to remove them in bulk

Tips

- Quote numbers are generated automatically in the format QTE-YEAR-NNNN
- Expiry dates shown in red indicate the quote has passed its valid date
- Optional items let you present upsell options without inflating the quoted total
- Tax rates are pulled from your configured tax rate list and applied only to taxable items
- A quote can only be converted once — the system prevents duplicate contracts or invoices from the same quote
- The **Revised** status is applied when a sent quote is updated, keeping a clear history of changes
- Links from a Project or Account page automatically pre-fill those fields when creating a new quote